



WELCOME TO THE

# 2023

# CALAFCO

## ANNUAL CONFERENCE

OCTOBER 18 - 20, 2023  
Monterey, California



## SCHEDULE AT-A-GLANCE

### TUESDAY – OCTOBER 17

2:00 p.m. Monterey Bay Coastal Bike Tour

### WEDNESDAY – OCTOBER 18

7:00 a.m. Registration Opens

7:15 a.m. Mobile Workshop

10:00 a.m. LAFCo 101: Building on the Basics of LAFCo

1:30 p.m. Conference Opening

2:00 p.m. General Session: What's New with New Or Extended Services Outside Jurisdictional Boundaries?

3:15 p.m. Refreshment Break

3:30 p.m. General Session: Disaster Recovery: It's Everyone's Business

5:30 p.m. Reception

7:00 p.m. Dinner on Your Own

### THURSDAY – OCTOBER 19

7:00 a.m. Breakfast Buffet

8:00 a.m. Regional Caucus Meetings and Elections

9:15 a.m. CALAFCO Annual Business Meeting

10:30 a.m. Break

10:45 a.m. Attorney and Regional Roundtables

12:00 p.m. Lunch - Keynote Speaker

1:45 p.m. **BREAKOUT SESSIONS**

1) LAFCo Dynamics

2) Your Community's Fire Service: Top Notch or Ticking Time Bomb?

3:15 p.m. Break

3:30 p.m. **BREAKOUT SESSIONS**

1) When the Crystal Ball Hits the Wall

2) Guiding Adrift Agencies Back on Course

5:30 p.m. Pre-dinner Reception

6:30 p.m. Dinner and Awards

### FRIDAY – OCTOBER 20

7:00 a.m. Breakfast Buffet

7:30 a.m. CALAFCO Board of Directors Meeting

9:00 a.m. General Session: Municipal Services in the 21st Century

10:15 a.m. Break

10:30 a.m. General Session: LAFCos and Special Districts: A Look at the History, Current Challenges, and Future Opportunities Among These Agencies

12:00 p.m. Conference Adjourns

# WELCOME

## TO THE 2023 CALAFCO CONFERENCE!



### Welcome from the Chair of the Board

On behalf of the CALAFCO Board of Directors, I want to welcome you to our Annual Conference in Monterey. Thank you for joining us as we gather to merge ideas with solutions to address the unique and complicated challenges of our great state. I encourage you to take advantage of the various educational and networking opportunities that are planned over the next several days. Also take advantage of the perspectives from around the state to discuss statewide and local issues critical to LAFCo, learn from speakers and consultants who are experts in their fields, and share ideas with one another. Enjoy the conference!

#### Bill Connelly

Chair, CALAFCO Board of Directors



### Welcome from the Conference Chair

Welcome to the 2023 CALAFCO Annual Conference! The Conference Committee thanks you for taking time out of your busy schedule to attend. We are bringing you a line-up of thought provoking programs that are relevant to you and your local LAFCo. The speakers, moderators and panelists have first hand experience and are here to impart their knowledge. Your engagement in the sessions will also give us new insights and perspectives on issues we will be facing.

Please network and share your experiences so we can be resources for each other and tackle our challenges together.

I hope you enjoy your time in Monterey and at the conference.

#### Anita Paque

Commissioner Calaveras LAFCo; Member and Past President, CALAFCO Board of Directors

### Keynote Speaker:

#### Jeannette Tuitele-Lewis

President and CEO, Big Sur Land Trust



Jeannette Tuitele-Lewis became BSLT's President and CEO in October of 2014. Born in California, Jeannette split much of her youth between the West Coast and the Pacific Islands. Her early experiences exploring the oak woodlands of Solano County and the forests of American Samoa sparked a lifelong passion for land conservation and the study of the relationship between land and people. Under Jeannette's leadership, Big Sur Land Trust has expanded its mission to increase access to parks and open space with a focus on multi-benefit green infrastructure projects and community-driven planning processes. Jeannette is the immediate past Chair of the California Council of Land Trusts and serves on the national Leadership Council of the Land Trust Alliance. She also serves on the board of the Peggy and Jack Baskin Foundation and serves as an advisor for the Women's Fund at the Community Foundation of Monterey County. In 2021, Jeannette served on an advisory panel that made recommendations for how the state should define conservation lands for California's 30x30 initiative.



# CONGRATULATIONS CALAFCO ON ANOTHER GREAT CONFERENCE



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# SCHEDULE

## PRE-CONFERENCE ACTIVITIES

**Tuesday, October 17**

**2:00 p.m. – 4:00 p.m.**

**Monterey Bay Coastal Bike Tour**

*This fun, easy ride will be along the oceanfront recreation trail in Monterey and Pacific Grove. FREE to everyone and no advance registration is needed. Bring your own bicycle or rent one in town. Meet at the anchor outside of the Stanton Center (by Fisherman's Wharf and Custom House Plaza).*

**4:00 p.m. – 6:00 p.m.**

**Registration** Location: Regency Foyer

**Wednesday, October 18**

**7:15 a.m. – 12:30 p.m.**

**Mobile Workshop**

*Planners: Monterey LAFCo: Supervisor/Commissioner/CALAFCo Board Member Wendy Root Askew, Commissioner/Monterey Peninsula Airport District Board Member Mary Ann Leffel, Executive Officer Kate McKenna, and Senior Analyst Jonathan Brinkmann; and Monterey Peninsula Airport District: Executive Director Michael La Pier and Airport staff*

**10:00 a.m. – 12:00 p.m.**

**LAFCo 101: Building on the Basics of LAFCo** Location: Regency IV, V & VI

*Government codes? Statutory requirements? Legal ramifications? If any of these have you scratching your head sometimes, fear not because this "LAFCo 101" session will not only give you an inside scope on becoming a LAFCo expert in these areas but will also be entertaining beyond belief. Don't take our word for it and check this session out – you won't be disappointed.*

*Panelists: Joe Serrano, Executive Officer, Santa Cruz LAFCo; Paula C. P. de Sousa, Partner, Best Best & Krieger LLP's Special District Practice Group; SR Jones, Executive Officer, Nevada LAFCo - Moderator: Joe Serrano*

**2.0 AICP CM Credits**

## WEDNESDAY, OCTOBER 18<sup>TH</sup>

**7:00 a.m. – 4:00 p.m.**

**Registration** Location: Regency Foyer

**1:30 p.m. - 2:00 p.m.**

**Conference Opening** Location: Regency Main I, II & III

**2:00 p.m. – 3:15 p.m.**

**General Session: What's New with New Or Extended Services Outside Jurisdictional Boundaries?** Location: Regency Main I, II & III

*This session will discuss the application, scope, and exemptions under Government Code section 56133 (New or Extended Services Outside Jurisdictional Boundaries). Presented by two Executive Officers and a LAFCo General Counsel, the panelists will discuss current challenges, approaches from different LAFCos, and proposals for administering the process under the statute.*

*Panelists: Brendon Freeman, Executive Officer, Napa LAFCo; Joshua Nelson, Partner, Best Best & Krieger LLP; Keene Simonds, Executive Officer, San Diego LAFCo - Moderator: Gary Bell, Shareholder, Colantuono, Highsmith, and Whatley*

**1.25 AICP CM credits**

**3:15 p.m. – 3:30 p.m.**

**Refreshment Break** Location: Regency Foyer

**3:30 p.m. – 5:00 p.m.**

**General Session: Disaster Recovery: It's Everyone's Business**  
Location: Regency Main I, II & III

*Natural disasters are a way of life in California. So, what now? This session will discuss disaster prevention and recovery efforts based on real-world experience and examine the challenge of meeting the state's housing needs in a time of drought, wildfire, and flooding; all while balancing the need to preserve our precious agricultural resources. Speakers will dare to question the role of LAFCo in the disaster-prone world we live in.*

*Panelists: Shannon Costa, Deputy Executive Officer, Butte LAFCo; Stephen Lucas, Executive Officer, Butte LAFCo; Joe Serrano, Executive Officer, Santa Cruz LAFCo; Uma Hinman, Executive Officer, Mendocino LAFCo - Moderator: Shannon Costa*

**1.5 AICP CM credits**

**5:30 p.m. – 7:00 p.m.**

**Reception** Location: Regency Terrace

**7:00 p.m.**

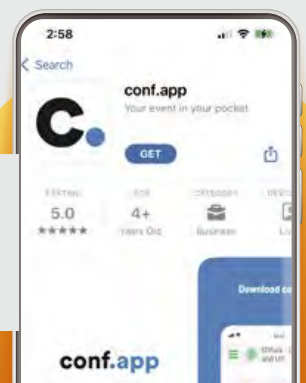
**Dinner on Your Own**



Wifi | Log-in credentials  
Network: HYATT-MEETING Password: calafco23

## Calafco Event App

1. Download **conf.app** from the App Store or Google Play
2. Scan the QR code (to the right) to load the event on the app, or type the event URL into your phone, <http://bit.ly/23CALAFCOConference>
3. Press on it to access



# THURSDAY, OCTOBER 19<sup>TH</sup>

# SCHEDULE

7:00 a.m. – 9:00 a.m.	<b>Breakfast Buffet</b> <i>Location: Monterey Ballroom</i>
8:00 a.m. – 4:00 p.m.	<b>Registration</b> <i>Location: Regency Foyer</i>
8:00 a.m. – 9:00 a.m.	<b>Regional Caucus Meetings and Elections</b> <i>Locations: Big Sur, Cypress, Spyglass, and Windjammer Rooms</i>
9:15 a.m. – 10:30 a.m.	<b>CALAFCO Annual Business Meeting</b> <i>Location: Regency Main I, II &amp; III</i>
10:30 a.m. – 10:45 a.m.	<b>Break</b>
10:45 a.m. – 11:45 a.m.	<b>Regional &amp; Counsel Roundtables</b> <i>Locations: Big Sur, Cypress, Spyglass, Windjammer, and Oak Tree Rooms</i>
12:00 p.m. – 1:30 p.m.	<b>Luncheon, Keynote Speaker Jeannette Tuitele-Lewis</b> <i>Location: Monterey Ballroom</i> <i>Land Trusts As Community Partners For Local Government</i>
1:45 p.m. – 3:15 p.m.	<b>Breakout Sessions</b>

## **LAFCo Dynamics** *Location: Regency Main, I, II & III*

Discover the power of synergy as LAFCo commissioners and staff unite in a transformative session, unraveling the secret to successful collaboration, where their joint efforts amplify efficiency, creativity, and community impact, elevating their partnership to unprecedented heights.

Panelists: Brendon Freeman, Executive Officer, Napa LAFCo; Michael Kelley, Commissioner, Imperial LAFCo; Peter Johnson, Commissioner, San Joaquin LAFCo; Russ Melton, Chair, Santa Clara LAFCo; Kenneth Leary, Commissioner, Napa LAFCo - Moderator: Jason Fried, Executive Officer, Marin LAFCo

1.5 AICP CM credits

## **Your Community's Fire Service: Top Notch or Ticking Time Bomb?** *Location: Regency IV, V, and VI*

This session is from the commissioner's perspective. Learn how the MSR Process can be designed to help you make the best decisions for your community and to be inclusive of all stakeholders. Learn how to get buy-in from your fire agencies while also providing them with a study that complies with their legal mandates.

Panelists: Brian Helmick, Deputy Fire Chief, Contra Costa County Fire Protection District; Kurt Latipow, Vice President Emeritus, AP Triton; Yoriko Kishimoto, Commissioner, Santa Clara LAFCo; Joe Serrano, Executive Officer, Santa Cruz LAFCo - Moderator: Kurt Latipow

1.5 AICP CM credits

3:15 p.m. – 3:30 p.m.

**Break**

3:30 p.m. – 5:00 p.m.

**Breakout Sessions**

## **When the Crystal Ball Hits the Wall** *Location: Regency Main, I, II & III*

Predicting the future is as easy as picking winning Lotto numbers, yet time and again we still try. Join us for a fun session where we discuss issues and trends that may affect LAFCos in the not-as-distant-as-we'd-like future.

Panelists: Jaron Brandon, Supervisor, County of Tuolumne; Thomas Nisbet, Associate Partner, IBM Cognitive and Advanced Analytics in State and Local Governments; Dr. Keith Taylor, Assistant Professor of Cooperative Extension & Community Economic Development, UC Davis - Moderator: Paul Novak, Executive Officer, Los Angeles LAFCo

1.5 AICP CM credits

## **Guiding Adrift Agencies Back on Course** *Location: Regency IV, V, and VI*

Every county has at least one agency that pushes the envelope in complying with laws governing special districts. This session will cover tools that are available to LAFCos in assisting these agencies to operate in a manner appropriate to a public agency. Topics will include potential alliances with other agencies with jurisdiction, possible LAFCo actions and legal considerations, and the MSRs and SOLs as communication and guidance tools.

Panelists: Leslie J. Girard, County Counsel and Risk Manager, County of Monterey; Marsha Burch, Attorney, Law Office of Marsha A. Burch; Kai Luoma, Executive Officer, Ventura LAFCo - Moderator: Jennifer Stephenson, Co-founder/Principal, Policy Consulting Associates (PCA)

1.5 AICP CM credits

5:30 p.m. – 6:30 p.m.

**Pre-dinner Reception** *Location: Monterey Terrace*

6:30 p.m. – 8:30 p.m.

**Dinner and Awards** *Location: Monterey Ballroom*

# SCHEDULE

# FRIDAY, OCTOBER 20<sup>TH</sup>

<b>7:00 a.m. – 9:00 a.m.</b>	<b>Breakfast Buffet</b> <i>Location: Monterey Ballroom</i>
<b>7:30 a.m. – 8:45 a.m.</b>	<b>CALAFCO Board of Directors Meeting</b> <i>Location: Cypress I, II and III</i>
<b>8:00 a.m. – 9:00 a.m.</b>	<b>Registration</b> <i>Location: Regency Foyer</i>
<b>9:00 a.m. – 10:15 a.m.</b>	<b>General Session: Municipal Services in the 21st Century</b> <i>Location: Regency Main I, II &amp; III</i>

*Historically, LAFCo's MSRs have focused on water, wastewater, and fire protection. Should we be looking at services that may or may not be provided by municipalities but are prominent in today's modern age? Modern services such as mental & behavioral health, housing, and economic development, to name a few, will be explored and discussed through the lenses of LAFCo and revolutionary practitioners as well as how MSRs have evolved.*

*Panelists: Carolanne Ieromnimon, Local Government Analyst II, San Diego LAFCo; Keene Simonds, Executive Officer, San Diego LAFCo; Bob Braitman, Retired Executive Officer, Ventura LAFCo - Moderator: Carol Ieromnimon*

**1.25 AICP CM credits**

<b>10:15 a.m. – 10:30 a.m.</b>	<b>Break</b>
<b>10:30 a.m. – 12:00 p.m.</b>	<b>General Session: LAFCos and Special Districts: A Look at the History, Challenges, and Opportunities</b> <i>Location: Regency Main I, II &amp; III</i>

*Ever wonder how many districts are in California? How they are governed? What issues are they currently facing? This session will provide an overview of special districts and will feature experts from the California Special Districts Association. You don't want to miss this informative, yet entertaining, general session.*

*Panelists: Kyle Packham, Advocacy & Public Affairs Director, California Special Districts Association; Joe Serrano, Executive Officer, Santa Cruz LAFCo; Ron Duncan, General Manager, Soquel Creek Water District - Moderator: Joe Serrano*

**1.5 AICP CM credits**

<b>12:00 p.m.</b>	<b>Conference Adjourns</b>
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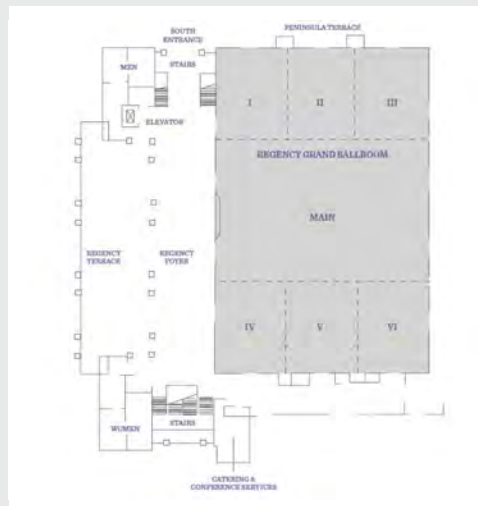


## HYATT REGENCY MONTEREY MAP

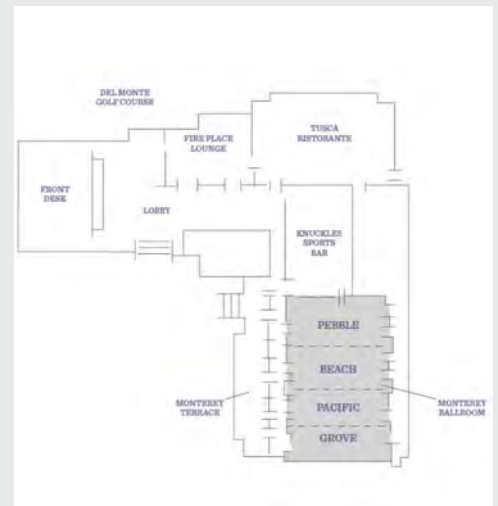
*First Floor - Regency Grand Ballroom and Conference Center*



*Second Floor - Regency Grand Ballroom and Conference Center*



*Lobby Level - Monterey Ballroom and Terrace*





# CALAFCO BOARD OF DIRECTORS

**Bill Connelly, Chair**  
**Margie Mohler, Vice Chair**

**Acquanetta Warren, Treasurer**  
**Daniel Parra, Secretary**

## NORTHERN REGION

**Bill Connelly**  
*Butte LAFCo*  
**Blake Inscore**  
*Del Norte LAFCo*  
**Debra Lake**  
*Humboldt LAFCo*  
**Josh Susman**  
*Nevada LAFCo*

## SOUTHERN REGION

**Michael Kelley**  
*Imperial LAFCo*  
**Jo MacKenzie**  
*San Diego LAFCo*  
**Derek McGregor**  
*Orange LAFCo*  
**Acquanetta Warren**  
*San Bernardino LAFCo*

## CENTRAL REGION

**Gay Jones**  
*Sacramento LAFCo*  
**Rodrigo Espinosa**  
*Merced LAFCo*  
**Anita Paque**  
*Calaveras LAFCo*  
**Daniel Parra**  
*Fresno LAFCo*

## COASTAL REGION

**Wendy Root Askew**  
*Monterey LAFCo*  
**Michael McGill**  
*Contra Costa LAFCo*  
**Margie Mohler**  
*Napa LAFCo*  
**Shane Stark**  
*Santa Barbara LAFCo*

# CALAFCO STAFF

**René LaRoche, Executive Director**  
**Clark Alsop, Legal Counsel**  
**Jeni Tickler, Administrator**  
**Stephen Lucas, Executive Officer**

**José Henriquez, Deputy Executive Officer**  
**Dawn Mittleman Longoria, Deputy Executive Officer**  
**Gary Thompson, Deputy Executive Officer**

# CALAFCO CONFERENCE PLANNING COMMITTEE

## BOARD MEMBERS

**Anita Paque, Chair,**  
*Calaveras LAFCo*

**Gay Jones, Sacramento LAFCo**  
**Derek McGregor, Orange LAFCo**

**Margie Mohler, Napa LAFCo**  
**Josh Susman, Nevada LAFCo**

## MOBILE WORKSHOP

**Michael La Pier, Monterey Peninsula Airport District**  
**Wendy Root Askew, Monterey LAFCo**  
**Mary Ann Leffel, Monterey LAFCo**  
**Kate McKenna, Monterey LAFCo**  
**Jonathan Brinkmann, Monterey LAFCo**

## STAFF

**José Henriquez, Co-Chair, Sacramento LAFCo**  
**Gary Bell, Colantuono Highsmith & Whatley**  
**Gavin Centeno, Orange LAFCo**  
**Shannon Costa, Butte LAFCo**  
**Brendon Freeman, Napa LAFCo**  
**René LaRoche, CALAFCO**  
**Kurt Latipow, AP Triton**  
**Carolanne Ieromnimon, San Diego LAFCo**  
**Kate McKenna, Monterey LAFCo**  
**Michaela Peters, San Diego LAFCo**  
**Joe Serrano, Santa Cruz LAFCo**  
**Jennifer Stephenson, Policy Consulting Associates**

## GOLD ASSOCIATE MEMBERS



# In Memory



**LOU CALCAGNO**  
1936 - 2023  
(MONTEREY)



**STAN CALDWELL**  
1950-2023  
(CONTRA COSTA)



**TOM COOLEY**  
1942 - 2023  
(PLUMAS)



**RON IUDICE**  
1948 - 2022  
(MARIPOSA)



**THOMAS PERKINS**  
1926 - 2023  
(MONTEREY)



**HARRY PRICE**  
1937 - 2022  
(SOLANO)



**GARY SANDY**  
1955 - 2023  
(YOLO)

# ABOUT THE SPEAKERS

## **Gary Bell — Shareholder, Colantuono, Highsmith, and Whatley**

Gary is a Shareholder of Colantuono, Highsmith, and Whatley law firm. He currently serves as City Attorney for multiple Northern California Cities and towns as well as General Counsel for LAFCo of Napa County, Upper Valley Waste Management Agency, Garden Valley Fire PD, Pine Grove CSD, River Pines PUD, and the First 5 Yuba Commission. His practice covers municipal law and public law, including matters involving LAFCos. Before joining CH&W, Gary served as City Attorney for the City of Firebaugh and advised municipal clients throughout California on a wide range of issues, including counties, cities, school districts, and special districts. Gary graduated from UC Santa Cruz with a B.A. in psychology. He received his J.D. in 2012 from the UC Davis School of Law. While at Davis, Gary worked as a law clerk in the Governor's Office of Legal Affairs and as a legal extern at the Placer County Superior Court.

## **Bob Braitman — Retired Executive Officer, Ventura LAFCo**

Bob specializes in the provision of services by local agencies, fiscal analysis, local government reorganizations and jurisdictional relations. He began his public service career working for 24 years in the Ventura County Executive Office providing budget review and administrative analysis. He is one of LAFCos' longest serving Executive Officers, having served as an Executive Officer in four counties for a total of 40 years.

## **Jaron Brandon — Supervisor, County of Tuolumne**

Jaron Brandon, one of our state's youngest county leaders, serves as the District 5 Supervisor for Tuolumne County, California, a region nestled in the Sierra Nevada foothills that encompasses the towns of Columbia and Jamestown. Brandon focuses on key issues

such as affordable housing, economic development, citizen access to government, public safety, and forest management, always looking to prepare and empower his community for the next generation. Brandon has also served on the Tuolumne County LAFCo for two years.

## **Marsha Burch — Attorney, Law Office of Marsha A. Burch**

Marsha is an attorney representing a wide range of public and private clients, environmental groups, tribes, special districts, agricultural growers, developers, citizen groups and individuals. Her focus lies in matters involving natural resource and environmental law, water rights, water quality, and land use under municipal, state, and federal laws. She has been advising LAFCos and special districts for over 15 years and has significant experience with CEQA compliance and litigation.

## **Shannon Costa — Deputy Executive Officer, Butte LAFCo**

Shannon serves as the Deputy Executive Officer of Butte LAFCo. She has 10 years of planning experience, including time with the City of Chico and the County of Tehama. Shannon graduated from CSU Chico with a Bachelor's degree in Human Geography with an Option in Planning. In her personal life, Shannon enjoys golfing and house projects with her husband and young daughter.

## **Paula De Sousa — Partner, Best Best & Krieger LLP's Special District Practice Group**

Paula is a partner in Best Best & Krieger LLP's Special District practice group, based out of the firm's San Diego office. Paula joined BBK upon graduating from the University of the Pacific, McGeorge School of Law. Paula practices in most areas of public agency representation, including the CKH Act. Paula serves as legal counsel to San Bernardino LAFCo, assistant legal counsel to Orange LAFCo,

and serves as general counsel to several special districts in San Diego County (agencies providing sewer and water services). She advises CALAFCo as assistant general counsel, assists in drafting legislation on CALAFCo's behalf, and regularly advises other public agency clients with respect to LAFCo-related issues. She is the primary author of several "white papers" utilized by LAFCos and public agencies throughout the state on changes in law impacting changes of organization and reorganizations.

## **Ron Duncan — General Manager, Soquel Creek Water District**

Ron has served as the General Manager (GM) of the Soquel Creek Water District for eight years, and as the Conservation Manager before that. Ron also sits as a Trustee of the WaterReuse California (WRCA) Board of Trustees, and sits on the American Water Works Association Utility Council. Ron's professional career has always focused on water and spans both the private and public sectors. He holds a B.S. in Geology, an M.S. in Hydrology, an MBA, and has completed a fellowship in an Executive Master's program for organizational leadership titled "Positive Leadership and Strategy." In 2018, Ron received the recognition of Certified Special District Manager from the Special District Leadership Foundation.

## **Brendon Freeman — Executive Officer, Napa LAFCo**

Brendon is a Napa native who served as LAFCo Analyst from 2008 to 2015 before being appointed as Executive Officer. Brendon earned an undergraduate degree in economics with a minor in statistics from UC Davis. Brendon is a graduate of Leadership Napa Valley Class 33 and is an active member of the Napa Sunrise Rotary Service Club. Brendon is married and has one son.

## **Jason Fried — Executive Officer, Marin LAFCo**

Jason is the Executive Officer for Marin LAFCo and before that, he served as Executive Officer for the San Francisco LAFCo. Prior to working for LAFCo, he worked in Washington, D.C., at the White House, Department of Interior, and on Capitol Hill. Jason has worked on land use issues in the California desert.

## **Leslie J. Girard — County Counsel and Risk Manager, County of Monterey**

Leslie serves as the Monterey County Counsel and County Risk Manager, a position that he has held since October 2019. Prior to that appointment, he also held positions as the Chief Assistant County Counsel and Assistant County Counsel. As Chief Assistant County Counsel, he assisted County Counsel in overseeing operations of the office and advising Monterey County LAFCo, and other special districts. Leslie received his B.A. from San Diego State University in 1978, majoring in Political Science with a minor in Economics, and his J.D. from Georgetown University Law Center in 1981.

## **Brian Helmick — Deputy Fire Chief, Contra Costa County Fire Protection District**

As the Deputy Chief of the Contra Costa County Fire Protection District (CCCFPD), Brian possesses over 27 years of experience in fire protection and emergency response. His leadership role in successful fire reorganization and involvement in various statewide service agencies provide unique insights into the importance of MSRs for fire agencies.

## **Uma Hinman — Executive Officer, Mendocino LAFCo**

Uma is the President of Hinman & Associates Consulting, Inc., as well as the Executive Officer for Mendocino LAFCo. She brings over 20 years of experience as a land use and environmental planner in Northern California,

# ABOUT THE SPEAKERS

and is an accomplished project manager, consistently demonstrating her ability to work collaboratively with clients, agencies and stakeholders. Uma's broad experience includes land use and water planning for local government agencies, LAFCo's, special districts, and Integrated Regional Water Management (IRWM) groups; grant management and administration; emergency action planning; and regulatory compliance. Additionally, Uma's background includes watershed research, biological and water quality monitoring field work, and firefighting for CALFIRE. With a B.S. in Environmental Science from Humboldt State University (emphasis in Watershed Management), she continues to hone her skills through continuing education courses, workshops and conferences.

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## **Carolanne Ieromnimon — Local Government Analyst II, San Diego LAFCo**

Carol Ieromnimon has been an Analyst with San Diego LAFCo since November 2021. She is a Master of Public Administration graduate from Cal State University Long Beach and a UCR alumni. Outside of work, she enjoys reading, exercising and cooking.

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## **Peter Johnson — Commissioner, San Joaquin LAFCo**

In addition to being a LAFCo Commissioner, Peter also serves as the Director of both the Westgate Center for Leadership and Management Development and the Institute for Family Business in the Eberhardt School of Business at the University of the Pacific. He founded the Institute for Family Business in 1997. Prior positions include Executive Vice President of Marketing and Sales for a national financial services firm, Executive Director of The Business Incubator, and founder and owner of several businesses in California. Peter is an educator, consultant and speaker, who works with for-profit, nonprofit, government

agencies and family businesses throughout North America to develop leadership solutions to business challenges. He is often quoted in the media and for seven years wrote a monthly leadership article for The Business Journal. Peter received his MBA from the University of the Pacific and a B.S. in Management from San Diego State University.

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## **SR Jones — Executive Officer, Nevada LAFCo**

SR Jones has worked with Nevada LAFCo since 1992 and has served as the Executive Officer of Nevada LAFCo since 1993. SR has also been involved with CALAFCo since 1994, serving on the Legislative Committee and several Program Committees. In 1997, and again in 2008, she was appointed Deputy Executive Officer. She served as Executive Officer of CALAFCo from 1998 until 2000, and again from 2009 to 2011. She received a degree in History from UC San Diego and currently resides near Nevada City.

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## **Michael Kelley — Commissioner, Imperial LAFCo**

Mike is a lifelong resident of Imperial County and a graduate of Imperial Valley College and San Diego State University, Imperial Valley Campus. He has been employed by the County of Imperial for the past 49 years; 10 years at Probation and Corrections as Juvenile Detention Officer, Deputy Probation Officer, Assistant Superintendent Juvenile Hall, Superintendent Juvenile Hall, and Director of Juvenile Facilities, and 10 years as Court Administrator/Jury Commissioner for Superior and Municipal Courts of Imperial County, 17 years as Chief Probation Officer, and 12 years as a member of the Board of Supervisors for District 3. Mike has served four terms on the Board of Supervisors, including three times as Chairman of the Board. He serves as Board Director for California Association Local Agency Formation Commissions (CALAFCo) and Commissioner

for the Imperial Local Agency Formation Commission.

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## **Yoriko Kishimoto — Commissioner, Santa Clara LAFCo**

Santa Clara LAFCo Commissioner Yoriko Kishimoto has served on Santa Clara LAFCo since 2013 and chairs the Technical Advisory Committee for its Countywide Fire Service Review. She is also the current president of the Midpeninsula Regional Open Space District and the former Mayor of the City of Palo Alto. Over her tenure in public service, Yoriko has served on the Board of Directors for the Santa Clara Valley Transportation Authority and on the Bay Area Air Quality Management District that oversees clean air regulations in the 9-county Bay Area region. She holds an MBA from Stanford University. Yoriko's extensive experience in public service, climate protection, and innovative approaches to building a green economy makes her an invaluable addition to the panel.

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## **Kurt Latipow — Vice President Emeritus, AP Triton**

With 40 years in Public Safety and over 27 years in Public Administration as a Fire Chief and Chief Officer, Kurt Latipow brings extensive expertise to the table. His experience in developing and implementing emergency and strategic plans, Standards of Cover Analysis, and other vital processes will offer valuable guidance during the session.

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## **Kenneth Leary — Commissioner, Napa LAFCo**

Ken was first elected to the American Canyon City Council in 2012 and reelected in 2016. He received a B.S. in Recreation and Leisure Studies, as well as an MPA in Public Policy from California State University East Bay. His professional employment history includes the Naval Air Station Alameda, City of Oakland Parks and Recreation, and the Town of Yountville, where he served as Community Services Director.

In 2016, Ken was appointed to Napa LAFCo as a City Member. He went on to serve on the ad hoc Budget and Outreach subcommittees. He served as Napa LAFCo Chair in 2020. When he chose not to seek a third term on City Council in American Canyon, he left the Commission temporarily and returned in 2021 when he was appointed as the Public Member. While on the City Council, Ken was an active member of the League of California Cities, Mayors, and Council Members Department, North Bay Division. He also served on the Community Services Policy Committee and the African American Caucus.

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## **Stephen Lucas — Executive Officer, Butte LAFCo**

Stephen is the Executive Officer for Butte LAFCo and has more than 27 years of LAFCo and land use planning experience. He is the CALAFCo Executive Officer on the CALAFCo Legislative Committee, serves on numerous other CALAFCo workgroups, and holds a Bachelor of Arts in Geography and a Master of Arts in Geography and Urban Planning from the California State University of Chico. Before joining LAFCo, he worked as a Land Use Planner for the County of Butte, serving as staff to the Planning Commission and Airport Land Use Commission. Aside from his professional pursuits, he has served his community for eight years on the City of Chico Airport & Parks Commission, as well as on the board of several local leadership development programs, and has served for three years as the Board Chair of a K-8 charter school.

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## **Kai Luoma — Executive Officer, Ventura LAFCo**

Kai joined the Ventura LAFCo in 2007 and has served as Executive Officer since 2014. Before joining LAFCo, Kai was a senior planner for the City of Santa Clarita, where one of his responsibilities was overseeing the city's frequent annexation proposals. He has also been

# ABOUT THE SPEAKERS

a planner with the City of Roseville, Nevada County, and San Joaquin County. Kai holds a Bachelor's degree in geography and a Master's degree in public administration.

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## **Russ Melton — Chair, Santa Clara LAFCo**

Russ is the Chairperson of the Santa Clara LAFCo, where he has served since 2017. He has also served on the Sunnyvale City Council since 2016, where he was Vice Mayor in 2018. Prior to that, Russ served on the Sunnyvale Planning Commission for 4 1/2 years, including 2 1/2 years as Chairperson. Consequently, he has a deep appreciation for land-use planning as a critical tool in public policy. Russ also serves as board Chairperson for the Silicon Valley Regional Interoperability Authority (SVRIA), a JPA that owns and operates the interoperable regional communications system used by first responders and emergency personnel throughout Santa Clara County. Russ worked for 20 years in various finance and management roles in the high-tech industry and prior to that served in the United States Navy. Russ has an MBA from Santa Clara University and an undergraduate degree from Cal Poly - San Luis Obispo.

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## **Joshua Nelson — Partner, Best Best & Krieger LLP**

Josh is a member of Best Best & Krieger LLP's Municipal Law practice group and provides city attorney and general counsel services to cities, special districts and joint powers authorities. Representative clients include Santa Cruz LAFCo, North Tahoe Public Utility District, Sonoma Clean Power and Soquel Creek Water District. In addition to his general counsel practice, Josh assists public agency clients with proceedings before local agency formation commissions. This includes annexations, detachments, consolidations and other reorganizations. Josh also serves

as the office managing partner for Best Best & Krieger LLP's Sacramento office.

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## **Thomas Nisbet — Associate Partner, IBM Cognitive and Advanced Analytics in State and Local Governments**

Thomas leads IBM Cognitive and Analytics offerings for IBM Consulting Public Markets. His experience and focus are concentrated on assisting Government entities in AI-driven customer service transformations and advanced analytics. With over 15 years of experience, he prioritizes leading teams to deliver business and technical results through partnership-driven governance models.

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## **Paul Novak — Executive Officer, Los Angeles LAFCo**

Paul Novak is the Executive Officer for Los Angeles LAFCo, a position he has held since January 2011. He served as the Planning Deputy to Los Angeles County Supervisor Michael Antonovich from 2003 to 2010. Mr. Novak has over 30 years of experience in local government and land-use planning, is a Consulting Zoning Hearing Officer for the City of Pasadena, and teaches land-use planning for several universities. He has a B.A. in Political Science from Claremont McKenna College and a Master of Real Estate Development from the University of Southern California.

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## **Kyle Packham — Advocacy & Public Affairs Director, California Special Districts Association**

Kyle joined the California Special Districts Association (CSDA) in 2010. As Advocacy and Public Affairs Director, Kyle oversees CSDA's lobbying, grassroots, and public relations efforts on behalf of its more than 1,300 members who provide essential local services to millions of Californians. Before coming to CSDA, Kyle served on staff in the State Capitol, working in both the Assembly and Senate. Kyle also gained local government

experience with Eastern Municipal Water District, where he worked in legislative affairs — among other departments. Kyle is an alumnus of the Jesse M. Unruh Assembly Fellowship; he possesses a Master of Public Administration degree from the University of Southern California and a B.A. in Political Science and Speech Communication from Pepperdine University.

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## **Joe Serrano — Executive Officer, Santa Cruz LAFCo**

Joe earned a double major in Finance & Accounting from Cal State University, Fullerton, and has over 14 years of LAFCo experience. He began his LAFCo career as an intern for Orange LAFCo in 2008 and was their analyst until 2013 before he started expanding his LAFCo knowledge with other LAFCos, including San Bernardino, San Diego, and Monterey. Today, he is now the Executive Officer of Santa Cruz LAFCo.

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## **Keene Simonds — Executive Officer, San Diego LAFCo**

Keene was appointed LAFCo Executive Officer in September 2017 and is responsible for overseeing the agency's regulatory and planning responsibilities consistent with Commission policies. Keene previously served as LAFCo Executive Officer in the San Francisco Bay Area (Marin and Napa Counties) along with holding different positions with a private consulting firm in Beverly Hills, California and a non-profit organization in Philadelphia, Pennsylvania. Keene holds undergraduate and graduate degrees from Pepperdine University and University of Southern California, respectively. Previous activities also include serving as a Board member for Marin Space and the California Urban Forest Council. Keene and his family live in Old Escondido.

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## **Jennifer Stephenson — Co-founder/ Principal, Policy Consulting Associates (PCA)**

Jennifer is a co-founder and principal of Policy Consulting Associates (PCA) where she is responsible for the overall direction of the projects, regional and municipal research analysis, and financial analysis. Her technical expertise includes benchmarking, performance evaluation, municipal budgeting, survey design, statistics, and economic modeling. She has also co-authored incorporation studies, annexation studies, and infrastructure needs assessments. Prior to establishing PCA, Jennifer was a research associate with Burr Consulting where she conducted performance evaluation studies of fire, water, and wastewater providers in Amador, Butte, Calaveras, and Yuba counties. She has analyzed transportation, air quality, water quality, open space, and park infrastructure needs in the 187-city Southern California region. Jennifer has served as an education analyst in the City of Los Angeles Mayor's Office and a statistical analyst at the UCLA Research Center. Jennifer earned her Master's degree in Public Policy from Pepperdine University where she was a Frostmann Scholar.

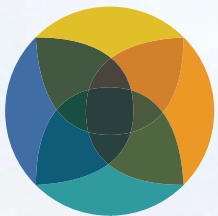
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## **Dr. Keith Taylor — Assistant Professor of Cooperative Extension & Community Economic Development, UC Davis**

Dr. Keith Taylor is an Assistant Professor of Cooperative Extension & Community Economic Development at UC Davis. He works directly and co-creatively with changemakers, urban planners and economic developers, and a range of business development interests to build community solutions to bring about communal economic development policies and hybrid enterprises, such as co-operatives, nonprofits, B-corps, small businesses, and associations.



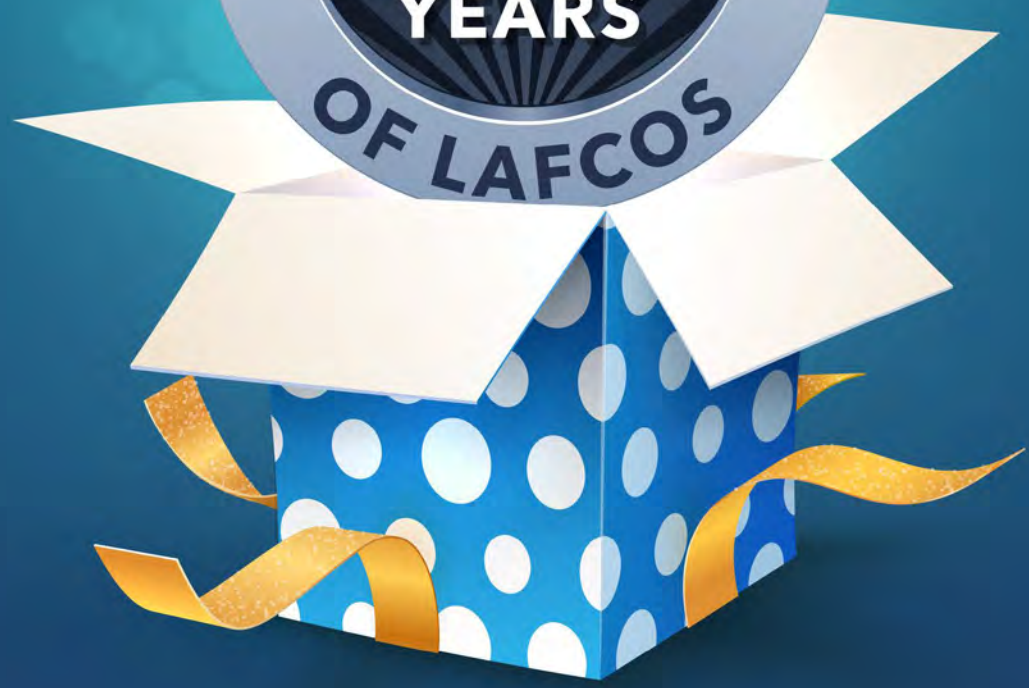
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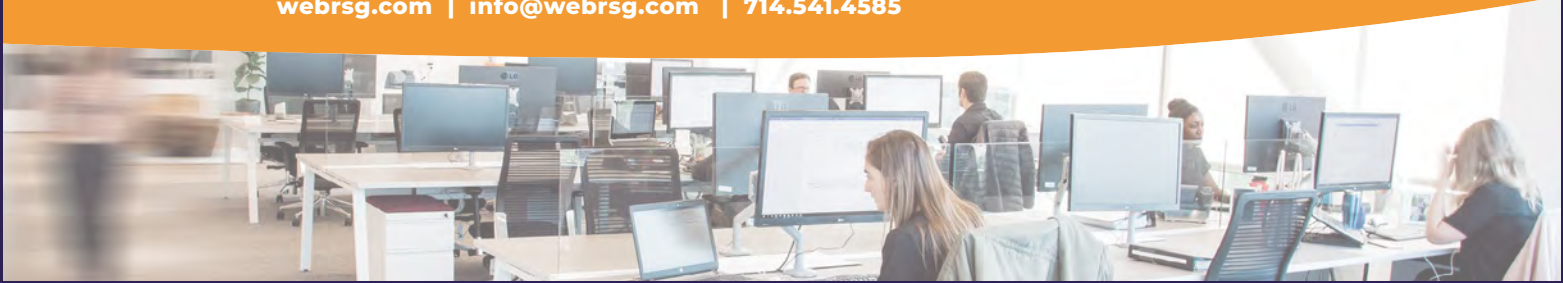
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